



IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In Re the Application of:

PURCELL

Serial No.: 10/034,872

Filed: December 28, 2001

For: "METHOD AND APPARATUS FOR  
[OPTIMIZING] INFORMING INVESTORS FOR  
JUDGING, SELECTING, AND HOLDING  
INVESTMENT PORTFOLIO PLANS [FOR]  
THAT OFFER OPTIMAL PROSPECTS FOR  
THEIR LONG-TERM FINANCIAL PLANS,  
[AND] GOALS, AND PRIORITIES" (As  
Amended)

) Art Unit: 3692

) Examiner: Clement B. Graham

) AMENDMENT AND RESPONSE

COMMISSIONER FOR PATENTS

P.O. Box 1450

Alexandria, Virginia 22313-1450

Dear Sir:

In response to the Examiner's Action having a mailing date of February 27, 2007, please amend the above-identified application as follows:

IN THE TITLE:

**METHOD AND APPARATUS FOR [OPTIMIZING] INFORMING INVESTORS FOR JUDGING, SELECTING, AND HOLDING INVESTMENT PORTFOLIO PLANS [FOR] THAT OFFER OPTIMAL PROSPECTS FOR THEIR LONG-TERM FINANCIAL PLANS, [AND] GOALS, AND PRIORITIES**

IN THE CLAIMS:

1. (Amended – completely rewritten) A method that relates to informing investors for judging, selecting, and maintaining informed commitment to investment portfolios with optimal prospects for their long-term investment plans, goals, and priorities, comprising: